Intelligent Contact Center Agent Guide

BCM50 3.0

CallPilot

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Chapter 1

Getting started

About this guide

The *Intelligent Contact Center Agent User Guide* explains how agents use CallPilot.

About CallPilot

CallPilot is an application that handles incoming calls as efficiently and economically as possible. CallPilot answers calls, then routes the calls to agents in a skillset that most closely meets the needs of the caller. If there are no agents available, the calls are placed in a skillset to wait for an appropriate agent. Waiting callers receive periodic announcements and informative messages

Audience

This guide is for Contact Center Agents. It is possible that not all features in this guide are available for your CallPilot. Please check with your supervisor for feature availability.

Symbols and text conventions

These symbols are used to highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	`Pswd:`	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	<u>PLAY</u>	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

These text conventions are used in this guide to indicate the information described.

Convention	Description
`bold Courier text`	Indicates command names and options and text that you need to enter. Example: Use the **`info`** command. Example: Enter **`show ip`** `{`**`alerts`**`|`**`routes`**`}`.
italic text	Indicates book titles
`plain Courier text`	Indicates command syntax and system output (for example, prompts and system messages). Example: `Set Trap Monitor Filters`
FEATURE **HOLD** **RELEASE**	Indicates that you press the button with the coordinating icon on whichever set you are using.

Chapter 2

Intelligent Contact Center Agent

Logging on to CallPilot

Log on to CallPilot so that calls can be routed to you. You cannot log on if the maximum number of agents is logged on, if you are logged on to another telephone, or if someone else is logged on to your telephone. You can log on only to skillsets that you are assigned to.

To log on from a two-line display telephone

1. Press ⟲ 9 0 4.
2. Enter your Agent ID and press OK or #.
   Your Contact Center Administrator can tell you your Agent ID.
3. Enter your password and press OK or #.
   The first time you log on, or when you log on after your password has been reset, enter the default password, 0000. If you enter the default password, you must create a new password.
4. Press IN to log on to one or all skillsets. If IN does not appear, you are already logged on to all the skillsets, or there are no skillsets available.
5. Press CHNG until the skillset that you want to log on to appears on the display. If you log on to all of the skillsets, you are logged on to all the skillsets that you are assigned to. If there is only one skillset available to log on to, you are automatically logged on to that skillset.
6. Press OK. You are logged on to the skillset number displayed, or all of the skillsets if ALL is displayed.
7. Press ☎.

Note: Multimedia CallPilot may not be available for your CallPilot.

Note: If you use a digital mobility handset to log on, you see your password for approximately one-half second before the display changes to xxx.

To log on from a one-line display telephone

When you log on from a one line display telephone you also log on to all skillsets you are assigned to.

1. Press [⦰] [9] [0] [4].
2. Enter your Agent ID and press [#].
   Your Contact Center Administrator can tell you your Agent ID.
3. Enter your password and press [#].
   The first time you log on, or when you log on after your password has been reset, enter the default password, 0000. If you enter the default password, you must create a new password.
4. Your agent name and `Logged into all` appears on the display to show that you are logged on to all of the skillsets you are assigned to. If you belong to only one skillset, `Logged into XX` appears, where XX is the number of the skillset you belong to. If `Logged out all` appears, repeat steps 1 through 3 to log on.

Logging on to Multimedia Contact Center

➡ **Note:** Multimedia CallPilot may not be available for your CallPilot.

To log on if you are taking only voice calls

Log on to your telephone the same way you log on as a Intelligent Contact Center agent, as described in "Logging on to CallPilot" on page 11.

To log on if you are taking only browser calls

On your computer, click the **Start** button, point to **Programs**, point to **Nortel**, point to **Multimedia** CallPilot and click **Agent Notification**. The Agent Notification page appears. Log on to Multimedia CallPilot.
For information about using Multimedia CallPilot, click Help.

To log on if you are taking voice and browser calls

Log on to your telephone the same way you log on as a Intelligent Contact Center agent, as described in "Logging on to CallPilot" on page 11, and then log on to Multimedia CallPilot on your computer.

What you should log on to

Ask your CallPilot Supervisor whether you can receive only voice calls, only Multimedia CallPilot calls, or both voice and Multimedia CallPilot calls.

→ **Note:** Multimedia CallPilot may not be available for your CallPilot.

Logging off CallPilot

When you are finished for the day or will be away from your telephone for an extended period, log off to stop calls from being routed to your telephone.

To log off from a two-line display telephone

1. Press ⊘ 9 0 4.
2. Enter your Agent ID and press OK or #.
3. Enter your password and press OK or #.
4. Press OUT. If OUT does not appear, you are not logged on to any skillsets.
5. Press CHNG until the skillset you want to log off from appears on the display. If you are logged on to only one skillset, that skillset is automatically selected.
6. Press OK.
7. You are logged off from the skillset number displayed, or from all skillsets if ALL is displayed.
8. Press ☎.

To log off from a one-line display telephone

When you log off from a one line display telephone you are also automatically logged off from all the skillsets you are logged on to.

1. Press ⊘ 9 0 4.
2. Enter your Agent ID number and press #.
3. Enter your password and press #. If you are logged on to multiple skillsets, `Logged out all` appears on the display to show you are logged off from all skillsets
   or
   if you are logged onto one skillset, `Logged out xx` appears, where xx is the skillset you were logged on to.
4. Press ☎.

Changing your agent password

Your Agent ID and password give you access to the skillsets you are assigned to. Keep your password confidential. Change your password on a regular basis, approximately every 30 days.

To change your password from a two-line display telephone

1. Press ⟲ 9 0 4.
2. Enter your Agent ID and press `OK` or #.
   Your Contact Center Administrator can tell you your Agent ID.
3. Enter your password and press `OK` or #.
4. Press `Admin`.
5. Enter a new password that is from four to eight digits long and press `OK` or #.
   Your password cannot start with a zero.
6. Re-enter your new password and press `OK` or #. `Password changed` is briefly displayed.
7. Press ☎.

Note: If you use a digital mobility handset to log on, you see your password for approximately one-half second before the display changes to xxx.

To change your password from a one-line display telephone

1. Press ⟲ 9 0 4.
2. Enter your Agent ID and press #.
   Your Contact Center Administrator can tell you your Agent ID.
3. Enter your password and press #.
   Your log on status changes from Logged on to Logged off or Logged off to Logged on.
4. Press 4 within the next five seconds.
5. Enter your new password and press #.
   Your password cannot start with a zero.
6. Re-enter your new password and press #. `Password changed` is briefly displayed.
7. Your original log on status appears.

Using Feature Codes

You use Feature Codes to access Intelligent Contact Center features. The default Feature Codes are shown below. Your Contact Center Administrator can program Custom Feature Codes that you use instead. If you use Custom Feature Codes, you can record them in the spaces below.

Feature	**Default Feature Code**	**Custom Feature Code**
Open mailbox	℮ 9 8 1	℮ 9 __ __
Log on/Log off	℮ 9 0 4 *	℮ 9 __ __
Supervisor Help	℮ 9 0 6 *	℮ 9 __ __
Activity Codes (may not be available on your system)	℮ 9 0 7 *	℮ 9 __ __
Not Ready	℮ 9 0 8 *	℮ 9 __ __
Display Waiting Calls	℮ 9 0 9 *	℮ 9 __ __
Record A Call	℮ 9 8 9	℮ 9 __ __

*You can program these CallPilot Feature Codes to memory buttons. For information about how to program a Feature Code to a memory button, refer to "Programming a memory button" on page 21.

Note: While you are using a feature, if you press the Feature ℮ button your present feature session ends. Do not press ℮ unless you want to end your current feature session.

Note: If you use a digital mobility handset, you must press the Feature ℮ button twice to end your current feature session. If you do not press the Feature ℮ button twice, you will not be able to make an outgoing call for two minutes.

Log on

Use ℮ 9 0 4 to log on to CallPilot and the skillsets you are assigned to. You can program a memory button with the Log on Feature Code. If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are not logged on.
- If the indicator is on, you are logged on.

For information about how to program a memory button, refer to "Programming a memory button" on page 21.

Supervisor Help

With Supervisor Help you can request help from a supervisor while you are on a call by pressing a programmed feature button. You can send an urgent request for help without interrupting the call, and without the caller being aware of your help request.

Note: Whether you can use Supervisor Help depends on the system your CallPilot uses. Ask your supervisor whether you can use Supervisor Help.

Supervisor Help is for situations where you are on a call and urgently require the help of a supervisor without alerting the caller that a supervisor is being called in. It is not intended for routine consultations or when you are not on a CallPilot call. You must be logged on to CallPilot and on a CallPilot call to use Supervisor Help.

To use Supervisor Help you must have a memory button programmed with the Supervisor Help Feature Code (F906). The programmed key must have an LCD indicator. The memory button can have a distinct bright color so it can easily be distinguished from the other buttons. For information about how to program a memory button, refer to "Programming a memory button" on page 21.

Activity Codes

You use Activity Codes to allocate calls to certain activities. You can press Ø 9 0 7 to start an Activity Code session anytime during or after the call until your Break Time ends.

Note: Activity Codes may not be available for your system.

Enter Activity Codes early in your Break Time to ensure that CallPilot records them.

If your Activity Code sessions are prompted, and you have not entered an Activity Code by the end of the call, your telephone display automatically prompts you to enter Activity Codes. It is recommend that you program a memory button with Ø 9 0 7. For information about how to program a memory button, see "Programming a memory button" on page 21.

If your Activity Code sessions are prompted, and you park and page a call, after you park the call an Activity Code session will not automatically appear on your telephone. If you want to enter an Activity Code for the call, you can do it during your Break Time by pressing Ø 9 0 7.

The Ø 9 0 7 session remains on your telset for 2 minutes, unless you enter an Activity Code or release the Ø 9 0 7 session.

To have an Activity Code session

1 During or after a call, anytime until your Break Time ends, press [©] [9] [0] [7] to start a session.

If you are prompted to enter Activity Codes, the [©] [9] [0] [7] session starts automatically.

```
Activity Id:
RETRY        OK
```

2 Enter an Activity Code number and press OK.

```
Sales support
RETRY        OK
```

3 The Activity Code name is displayed, in this example *Sales support*. Press OK to confirm this is the correct Activity Code or press RETRY to return to the display on step 2.

```
Another actv?
YES    NO
```

4 You can press YES to enter another Activity Code or press NO or RLS to end the [©] [9] [0] [7] session.

You can enter a maximum of 5 Activity Codes during a F907 session. You can have multiple F907 sessions during a call, and one session after the call ends.

Note: Ask your CallPilot supervisor for the list of Activity Codes.

Display Waiting Calls

Use Display Waiting Calls to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

Display	**Description**
Skill 1: Enabled	shows the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	shows the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	shows the skillset number and the number of calls waiting in the skillset
1: wait 9:45	shows the skillset number and the time of the call waiting longest in the skillset.

To Display Waiting Calls

1 Press ⊘ 9 0 9.
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
1	1 or GOTO	enter the number of the skillset you want to monitor
2	2 or SKILL	monitor the next enabled skillset
3 or 6	3 or 6 or NEXT	go to the next skillset
4	4 or PREV	go to the previous menu
#	#	go to the next menu
*	*	cancel the session
☎	☎	exit

Using Display Waiting Calls with a memory button

Program a memory button with ⊘ 9 0 9 to view the status of all skillsets, including the skillsets that you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset that you are logged on to.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the primary alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the secondary alert time.
  The CallPilot Administrator sets what the alert times are.

For information about how to program a memory button, refer to "Programming a memory button" on page 21.

Not Ready

If you use Not Ready, you do not receive calls. Your CallPilot Administrator can also program a Break Time, which makes CallPilot automatically wait a short time before it routes the next call to you. You can use the Break Time to complete any paperwork required by the last call. If you need some extra time, use Not Ready to prevent Intelligent Contact Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset.

It is recommend that you program a memory button with an indicator instead of pressing ⊘ 9 0 8. For information about how to program a memory button, refer to “Programming a memory button” on page 21.

Note: While you use Not Ready, you still receive non-CallPilot, intercom and transferred calls.

To use Not Ready

1. Press ⊘ 9 0 8. `Make Not Ready` appears on the display.
   If you press ⊘ 9 0 8 and `Break canceled` appears on the display, you canceled the Break Time that the CallPilot Administrator programmed for you. You must press ⊘ 9 0 8 again to activate the Not Ready feature.
   If you press ⊘ 9 0 8 and `Agent active` appears, the Not Ready feature was on and you canceled it. Press ⊘ 9 0 8 again to activate Not Ready.
2. Cancel the Not Ready feature by pressing ⊘ 9 0 8 when you are ready to take calls again.
   If `Not ready` appears, press ⊘ 9 0 8 again.
   Not Ready is automatically enabled if you do not answer your telephone, if Not Ready is configured in CallPilot.

Programming Not Ready to a memory button

You can have convenient, one-button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status.

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For information about how to program a memory button, refer to “Programming a memory button” on page 21.

Not-Ready Timeout

Not-Ready Timeout enables the agent, who is in the **Not Ready** state, to be automatically placed back in the available state after a pre-configured timeout. Use the CallPilot Manager to configure this feature. This feature is not available using the F983 or Telset UI.

Manual Not-Ready Timeout

Manual Not-Ready Timeout enables the agent to manually place themselves back in the available state after a pre-configured timeout. Use the CallPilot Manager to configure this feature. This feature is not available using the F983 or Telset UI.

Audible Notification Interval

Audible Notification Interval extends the **Not-Ready Timeout** feature. This feature audibly notifies the agent, through the set, when they are in the **Not-Ready** state. The **Not-Ready Timeout** must be configured for the agent to use this feature. Use the CallPilot Manager to configure this feature. This feature is not available using the F983 or Telset UI.

Agent Configurable Break Time

Agent Configurable Break Time allows configuration on a per-agent basis and allows the contact center to set the break time a lower value and make exceptions on an agent-by-agent basis. Use the CallPilot Manager to configure this feature. This feature is not available using the F983 or Telset UI.

Record A Call

With Record A Call (🌐 9 8 9), you can record an active telephone call. The recorded message is placed in the subscriber's mailbox. With appropriate setup, the call can also be placed as a .wav file in a network location. Before you activate Record A Call, ask the parties on the call for permission to record the call.

If you want to change the Record A Call setting, select **Disabled, Announced, or Silent** from the **Record-a-call** drop-down list. The default setting is **Disabled**.

If you want to add or change a network location where the **Record-a-call** will be recorded (as well as the subscriber mailbox), you need to specify the appropriate SFTP destination. SFTP destinations can be specified using Element Manager. From the Element Manager, click **Configuration > Application > Voice Messaging/Contact Center** to specify the SFTP destinations. When a system administrator defines an SFTP folder as a storage location on the network, these storage locations must be on an SFTP server. The BCM50 supports OpenSSH 3.7.

For more information about Record A Call, see the *CallPilot Manager Set Up and Operation Guide* (NN40090-300) or the *CallPilot Reference Guide* (NN40090-100).

Programming a memory button

You can program memory buttons for one-touch access to Intelligent Contact Center features. You can program memory buttons for:

- Log on ☎ 9 0 4
- Supervisor Help ☎ 9 0 6
- Not Ready ☎ 9 0 8
- Activity Codes ☎ 9 0 7 (If it is available for your system)
- Display Waiting Calls ☎ 9 0 9

You cannot assign features to Line, Intercom, Answer or Handsfree/Mute buttons.

Note: Activity Codes may not be available for your system.

To program a feature to a memory button

1. Press ☎ * 3.
2. Press the memory button that you want to program.
3. Press ☎ and enter the feature code.
4. Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Memory button indicators

Memory button indicators are triangular icons (▶) that appear beside some memory buttons. If you program Intelligent Contact Center features on memory buttons with indicators, the indicators show additional information about the feature.

Other CallPilot features

Using Automatic Answer

If you have Automatic Answer enabled, you can use handsfree to answer calls. An audible tone tells you that you have an incoming call. Ask your CallPilot Administrator if you have Automatic Answer enabled. Handsfree calls are convenient and time saving because you do not have to use the handset or press buttons on your telephone. If you use Automatic Answer, be sure to activate the Not Ready feature before you leave your desk so that callers are not routed to your telephone when you are away.

How Automatic Answer works depends on what type of telephones your CallPilot uses:

- **WLAN Handset 2210/2211**: There are two ways to set up the WLAN Handset 2210/2211 for the Automatic Answer feature in a Call Center environment:

  Place the WLAN Handset in the active (idle) state. When the call is received by the WLAN Handset, the handset automatically switches to the active (off-hook) state and the call proceeds as normal. **Note**: In the active (idle) state, WLAN Handset power consumption increases, which causes a decrease in the life of the battery (the time before a recharge is required). The handset is not normally left in the active (idle) state except for special situations.

  Place the WLAN Handset in the standby state. When the call is received by the WLAN Handset, the handset automatically answers the call, but cannot maintain the call. You must press the **Power on/Start Call** key before the call is dropped (after about 5 seconds) to maintain the call. If you do not press the **Power on/Start Call** key in time, the call is dropped.

  The user must end every call by pressing the **Power off/End Call** key to release the system resources.
- **i2002 and i2004 IP telephones**: If you connect the headset before you initialize the phone, calls are heard over the speaker. If you initialize the IP telephone before you plug in the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the IP telephone. Every time you reconnect the headset you must initialize the headset.
- **Meridian and Norstar telephones**: If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals**: If you connect the headset before you connect the telephone cable to the phone jack, calls goes to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset. Calls always ring at the set.
- **T7316e**: This type of telephone is safe to use for Automatic Answer.

Transferring calls

If you have a caller who needs to talk to another person or is routed to the wrong skillset, you can transfer the call. Do not use the Call Park feature.

To transfer a call

1. Press ⊘ 7 0, or TRANSFER on a two line display telephone.
2. Enter the extension of the person or skillset.
3. Press ☎, or JOIN on a two line display telephone.

Viewing call information

Your telephone display shows information about your current call.

While the call is ringing, the display shows the skillset the call came from. If your CallPilot is configured to show the Caller ID first, the Caller ID is shown briefly followed by the Skillset name.

When you answer a call, the display shows the Caller ID of the caller.

While you are on a call, you can press the INFO softkey to display:

- the telephone number the caller is calling from
- the caller name
- the line the call came in on

Silent Monitor

CallPilot Supervisors have the ability to silently monitor your calls, including personal calls.

If you make a call that you do not want to be monitored, first log off as an agent, then log on again when you complete your call. For example, you may want to log off before you check your personal voice mailbox messages so the supervisor cannot listen to them.

Important considerations about using features

Activity Codes

Agents who answer a call on an Answer DN telephone or use Call Pickup on a call that is ringing at another agent's set cannot enter Activity Codes.

Note: Activity Codes may not be available for your system.

Call Transfer

You can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- To send the call to a specific agent or another person, enter the Transfer Feature Code (☎ 7 0) and enter the extension number. For more information on transferring a call, refer to "Transferring calls" on page 23.
- To send the call to a skillset, enter the Transfer Feature Code (☎ 7 0) and enter the CDN of a skillset.

If you want to transfer a call to a mailbox, use ☎ 9 8 6.

Call Forward

Do not use Call Forward. If you use Call Forward you are automatically logged out or made busy, depending on your agent settings. You can use Call Forward to the voicemail DN.

Call Forward No Answer (CFNA)

If you forward a call by CFNA to another agent and the call is answered by that agent, because of your CFNA setting you are made Not Ready or logged out instead of staying idle.

Answer DN

The only way you should use Answer DN is if you program your portable set to be the Answer DN for your main telephone.

If you use your Answer DN telephone to answer a call that is transferred to you, CallPilot does not recognize you as being busy, and still sends calls to your main set.

Agents who log on from a regular telephone and answer CallPilot calls using an answer DN key from a portable telephone cannot use Supervisor Help (F906).

Do Not Disturb

Instead of using Do Not Disturb, use the Not Ready Feature Code (☎ 9 0 8).
If you use Do Not Disturb, you are automatically logged out or made Not Ready.

Follow-me browsing (Multimedia CallPilot agents only)

Follow-me browsing does not work with embedded Flash animations. If you click a Flash button, the image that you see is not displayed to the caller.

If the page you are sending to the caller contains Flash animations, you must explain to the caller how to display the page by (for example, clicking the Next button) or telling them what item to click on the page to display the next page.

Note: Multimedia CallPilot may not be available for your CallPilot.

Skillset mailboxes

Each skillset has a skillset mailbox assigned to it. Skillset mailboxes store messages left by callers. Check these mailboxes on a regular basis to ensure that customer messages are responded to promptly.

Checking skillset mailboxes for messages

Frequently check skillset mailboxes for messages. Only one agent at a time can retrieve messages from each skillset mailbox. If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or give the message to another agent. If only one agent retrieves the messages at your CallPilot, they do not need to transcribe and delete each message before callback. This agent knows the status of the old messages.

To play messages in a skillset mailbox

1. Press ⟲ 9 8 1.
   Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
2. Press PLAY or 2 to listen to your messages.
   For other options, refer to the user card for your telephone or the *CallPilot Reference Guide*.
3. Press ☎ to end the session.